

12 MORE Great Client Connections





2009 CLIENT CONTACT PLANNER

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	Client: Spouse: Children:	Time	 Phone	 E-mail	 Letter	 In person
			W: H:	Address:	Address:	
JAN	Put volatility in its place When markets act erratically, many investors do too. Provide comfort and stay connected with your clients; consider holding a seminar that offers reassurance, such as our <i>Staying Optimistic in a Volatile Market</i> presentation.	High 				
FEB	Be generous for a good cause We're talking about Girl Scout cookies! Show your commitment to one of the most popular fundraisers of the year by ordering lots of cookies from your clients' daughters or granddaughters.	Low 				
MAR	Make tax time less taxing Help relieve stress at tax time by offering reassurance with a simple phone call. Offer to review documents, contact their CPA and provide tax insights.	Low 				
APR	Watch things grow over time First, provide your clients with heirloom tomato seeds that thrive in any environment. Then, plant another seed in their minds — you have the resources and knowledge to help them protect valuable retirement assets.	Low 				
MAY	Make it a Mother's Day to remember Make this Mother's Day special by hosting a lunch for the women who would otherwise spend it alone. You'll make clients feel special and you'll show your value to the next generation.	High 				
JUN	Show your hometown spirit Sponsor a local baseball, softball or soccer team for kids. You'll demonstrate your commitment to the community, to helping young children, and to sports — all good things to clients and prospects.	Low 				

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JUL	Hold a networking event Hold networking events for clients who might be job searching and facilitate meetings with people you know. Our Retirement Tracker can help clients who are changing jobs.	High 				
AUG	At a time of celebration, think outside the box Do you want clients to remember you in an unforgettable way? Try sending official greetings from the White House to commemorate a valued client's special birthday, anniversary or milestone.	Low 				
SEP	Offer clients peace of mind When it comes to emergency preparedness, having vital information in one place can save valuable time. Use the Emergency Checklist to help your clients prepare for a crisis and demonstrate your commitment to their well-being.	Medium 				
OCT	Host a client appreciation event Many clients have pets they cherish, and you can make great emotional connections by recognizing and honoring this bond. Host an innovative client appreciation event based on pets and invite a groomer, trainer or vet to be a guest speaker.	Medium 				
NOV	Give thanks for your family With so much to be thankful for, this month is the ideal time for clients to make sure they have beneficiaries named and updated on all their financial accounts. Offer our print or online Beneficiary Checklist to make it easy.	Low 				
DEC	Special delivery for special clients This means having your best clients receive a gift delivered in person by you! Whether you buy or make something, make this year's gift WOW your clients when you hand deliver it.	Medium 				


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